QuickDOC For Windows

Latest Update Info (MLA '02):

QDPortal Program

QDPortal provides a dedicated Web Browser wrapper for monitoring and recording DOCLINE activity as entered on the Web-based DOCLINE interface; it captures the data that is later imported and saved in QuickDOC for lookup and reporting purposes.

Latest QDPortal Version is <u>1.0.6</u>, and was posted on May 12, 2002; it adds further support for **Internet Explorer versions 5.5 and 6.x**, along with other features discussed below.

QDPortal Installation. Installation Instructions are at:

> http://nnlm.gov/~quickdoc/InstallQDP.html

QDPortal Features Added in 1.0.6

1. Online Help Added, along with a new QDPortal Manual

   The old **Home** button has been replaced by a **QDPortal Help button**, which gives access to the **Windows Help System for QDPortal**. There's also a new version of the QDPortal manual that will be copied into your QDPortal Program folder (the filename is **QDPortal.PDF**) upon installation of the update. The old Home button won't be missed, since the DOCLINE Home menu choice brings us still to the DOCLINE Home screen, and the old Home button was in reality a Refresh instruction to the browser, and **Refresh** is still available by right-clicking any empty spot on the screen and choosing Refresh from the context menu.

2. DOCLINE Password Security, if desired.

   On the QDPortal Setup Screen, if you leave the Password field blank, you'll be prompted to enter it at the beginning of each DOCLINE session. In most cases, if your PC is secure, you can use the automatic password entry, but if you leave the machine unattended or it's used by a wide variety of people, leave the Password field blank and you'll be presented with a **DOCLINE Password Input Box** on each Login:

DOCLINE Password (No Automatic Entry)

Enter DOCLINE Password:

OK

Cancel
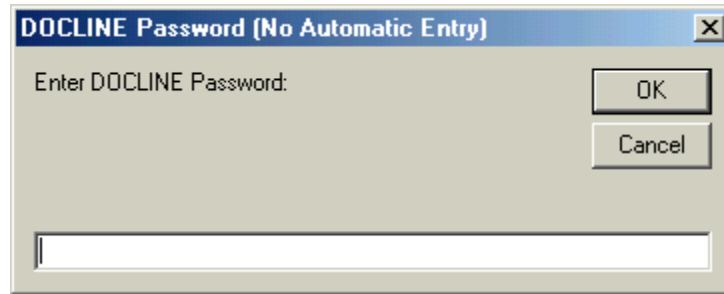
3. New Setup Choice to **send Patron Number only**, not name, etc.

On the Setup screen, check the **Send Patron [Number] Only (no names)** checkbox if you want to preserve Patron confidentiality by sending only the Patron Number with the request on DOCLINE. You'll still see that full information in the Patron List at the top right of the QDPortal screen, but when you double-click on the line of the Patron you want, only the number and brackets will be transferred to the Patron Name field on DOCLINE. The downside is that you won't see the Patron Name on the Cover Sheet when the item arrives, but it will appear when you check the item in on the QuickDOC Requests Outstanding Grid.

4. New **Save Cancel** Button so that Cancels can be saved in IE 5.5+.

Borrow Items Cancelled on DOCLINE are normally saved automatically (the filename is **Cancel.txt**), so that they can automatically update the associated item in the BorrowItems Table of QuickDOC.MDB to **Not Filled** with the Reason **Cancelled**. This works as expected in IE 5.01 but never happens in IE 5.5 or greater.

IE 5.5 must have made some change in how it orders frames or notifies an application that a page has been completed, because in IE 5.5, while it recognizes the Cancel URL and frame, it doesn't notify QDPortal that the page has been retrieved until after focus has moved off it back to the Status/Cancel page. So when QDPortal tries to save the information from the Cancel screen it finds that it isn't the current page; the Status/Cancel page is there, instead. And there is no frame on the Status/Cancel page that coresponds to what we expect to find in the Cancel main frame, so nothing is saved.

To work around this problem in IE5.5 and greater, QDPortal adds a new **Save Cancel Button** (only users with IE 5.5 and later will see this; if you're using IE 5.01 you can proceed as usual and Cancels will be saved automatically).

Save Cancel

Click this button if you don't see the appropriate 'Saved Cancel' message in the yellow box at the top.

This button will appear at the bottom of your screen if you're using IE 5.5 or greater and you venture into the **DOCLINE Status/Cancel area** and click the **Go Button**. (Since we don't know that the Cancel page is displayed until it has already passed and gone, we need to display the Save Cancel Button whenever we pass through Status/Cancel, so it will be there if needed for a Cancel display.

After clicking Cancel on a selected item, the Cancel Page (DOCLINE Requests Updated) is displayed. In IE 5.01, the note that the Cancel information has been saved appears automatically in the yellow box at the top of the screen at the same time as the display:

If you're using IE 5.5 or greater, however, you'll see **no Saved message in the yellow box** after the Cancel Page is displayed.

You have to **click the Save Cancel Button** to force the save. After clicking that command button you should be advised that the operation has been successful, again in the yellow box at the top.

QD Portal For DOCLINE (QD4Win)

Cancel has been saved to C:\QDBorrow\Cancel.txt.

Click Home to clear.

Stop

Exit QDPortal

Cancel Has Been Recorded For Items on This Page!

DOCLINE® interlibrary loan request routing and referral system

NATIONAL LIBRARY OF MEDICINE

REQUESTS   DOCUSER®   SERHOLD®   LD   HELP   HOME

Borrow   Lend   Receipt   Reports   Status/Cancel
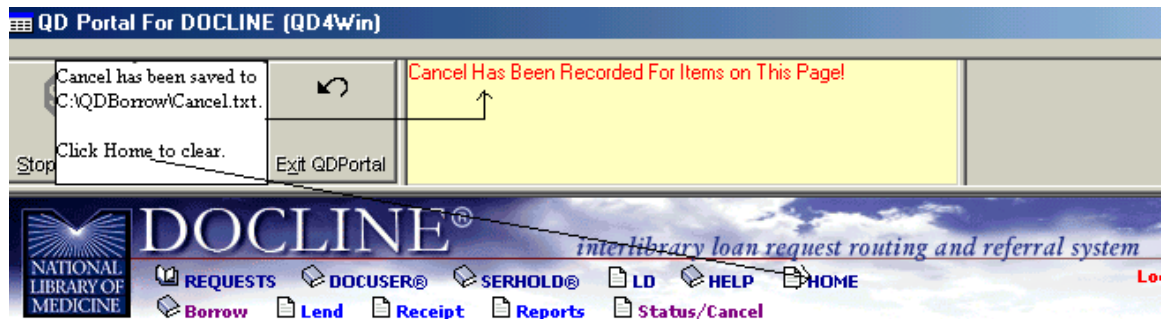
DOCLINE Requests Updated - May 09, 2002

Request Number	Action
6850725	Canceled

Either click Home to begin another transaction, or click Return if you want to go back to the Status/Cancel screen.

5. New **Save Locator+** Button to manually save items not saved automatically.

If you use the **DOCLINE Order button** in Locator+ to generate the request, whether for a **Monograph** or by using the **NLMUI of a Journal**, it won't be possible to save the data automatically. When we try, we get an Access Denied error on DOCLINE.

Once the form is completed and the Finish button is clicked, a Locator+ request must still be handled differently. The **short display** can't be saved automatically, but you will notice that a new **Save Locator+ Button** now appears at the bottom of the screen.

If you click the Save Locator+ Button while the Short Display is on the screen it will be saved in the short format:

QD Portal For DOCLINE (QD4Win)

STOP
Stop Search

QDPortal Help

Exit QDPortal

Brief Request Info Saved to File: C:\QDBorrow\6859754.txt
Click on the Request Number below to save the complete data set. Added Daly To List of Patrons...

DOCLINE® interlibrary loan request routing and

NATIONAL LIBRARY OF MEDICINE

REQUESTS   DOCUSER®   SERHOLD®   LD   HELP   HOME

Borrow

PubMed   UniqueKey   LOCATORplus   Manual   Transfer   Requestor

but it will be wise to continue on with the Full Display in any event.

GOOD RULE OF THUMB:
ALWAYS SHOW THE FULL DISPLAY, USING EITHER THE FULL DISPLAY BUTTON OR THE HYPERLINKED REQUEST NUMBER, IN ANY BORROW TRANSACTION!

Whether or not you save the Short Display, click the Request Number hyperlink to see the **Full Display**:

To repeat: It's a good idea to **ALWAYS CLICK FOR FULL DISPLAY IN ALL CASES for Borrows, either by clicking a Full Display Button or, as in this case, clicking the Request Number.**

After clicking the Request Number, the full request will be displayed. If it was created by copying the NLMUI from Locator+ and pasting into the Unique Identifier screen (explained below) then you will see a notice that it has been saved automatically. If it's a Locator+ generated item, you'll see the **Access Denied Message Box**.

"Access Denied" Error Trying To Save Data

The "Access Denied" problem keeps us from recording the information. When the Full Display screen appears, if you see this immediate Message Box:
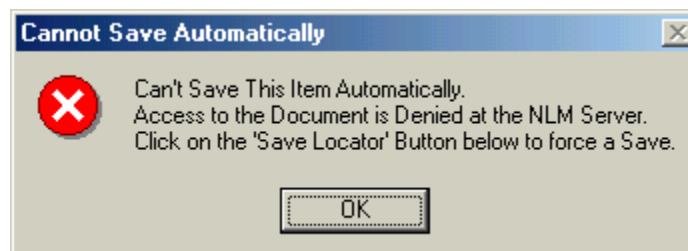
you can be sure that this request is one of those generated by the foreign domain. Use the Save Locator+ button again to save the full display data. After you click this button, you should see notice that the item has been saved:
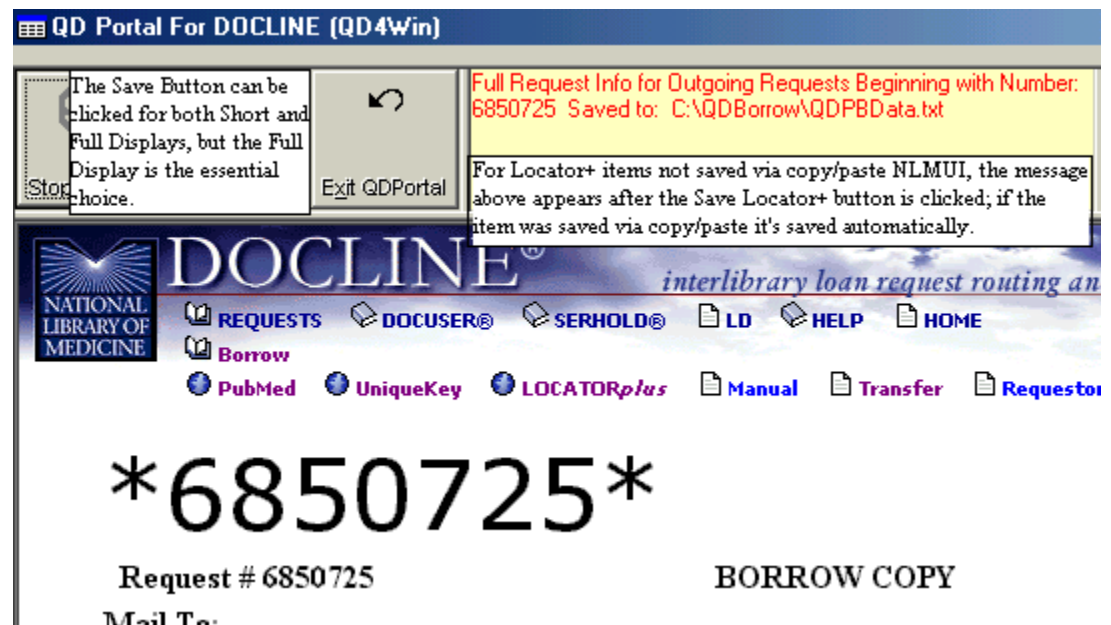
Perhaps a better method for dealing with Locator+ requests is to **sever the Locator+ connection at the very beginning of the Request Creation**. This is accomplished by simply **copying and pasting the NLMUI from Locator+ to the UI box in the Unique Key Request form** on DOCLINE and ignoring the **DOCLINE Order button** on the Locator+ screen entirely.

6. New **right-click Context Menu** for Patron List, Default Routing Prefix and NNA Date Command Buttons (permits cut-and-paste data entry on DOCLINE in situations where button-click doesn't work).

If by mistake you do use Locator+ to create the request (by clicking the **DOCLINE Order button**), you'll notice that you won't have access to some of the usual shortcuts while creating the Routing information. The automatic entry of Patron, NNA Date and Routing Prefix information isn't permitted (as you'll notice when you try clicking the buttons or double-clicking on a Patron on the Patrons List).

If you find yourself in this situation, you can recover by using a **Copy/Paste Workaround** that uses the right mouse button to accomplish what you normally accomplish by clicking the left mouse button. Here's the **context menu** you will see when using right-click on the Patrons List:

Right-clicking on the **NNA Date** or **Routing Prefix** button works in the same way.

7. Items saved through **DOCLINE's Status/Cancel** display are now checked three ways in order to properly identify them as Borrows or Loans.

If you notice that an item you ordered or received during the latest QDPortal session isn't added to the database (and, for Borrows, unless you check after every import you may not dotice this until the item arrives and you try to check it in), you can retrieve the item again from DOCLINE by using the **Status/Cancel function**. (The request must be recent, though, to use this, within the last four weeks or so.)

Go to Status/Cancel and either

1. Type in the **Request Number you're looking for** in the box at the left and click **GO**, or

2. Choose either DOCLINE or LD. Borrow, Lend or Transfer, and the number of days to look back (the Begin day equals today; the End days equal the number of days you want to go back) and click **GO** to get a **list of items**.

Once you get the list of items, or the single item you want, click on the Request Number to display:

QD Portal For DOCLINE (QD4Win)

STOP
Stop Search

?
QDPortal Help

↰
Exit QDPortal

Full Request Info for Outgoing Requests Beginning with Number:
6787667 Saved to: C:\QDBorrow\QDPBData.txt

NATIONAL LIBRARY OF MEDICINE

DOCLINE®   *interlibrary loan request routing and*

📖 REQUESTS 📄 DOCUSER® 📄 SERHOLD® 📄 LD 📄 HELP 📄 HOME
📄 Borrow 📄 Lend 📄 Receipt 📄 Reports 📄 Status/Cancel

Watch for the proper Save file above.
Borrows and LDs go to
C:\QDBorrow\QDPBData.txt, Lends to
C:\QDLoan\QDPLData.txt

6787667

Request # 6787667

You'll note that this item has been saved to the proper import file and will be imported into the database when next the Import QDPortal button is clicked in QuickDOC. Don't worry about getting duplicates in this manner as any dups are weeded out at the time of import. If in doubt, grab it.

In QDPortal 1.0.5 and earlier there were situations (mostly in IE 5.5, again) where Borrow Items were being imported into the Lend side. This occurred only when typing in the Request Number, not when choosing from the list, and this was caused because DOCLINE uses the Receipt Page to display items retrieved by Request Number, whether they are Borrows or Lends. Version 1.0.6 will double-check the Routing Reason field on these items to identify it as a Borrow or Lend: if the LIBID in that field is your LIBID, it's a Lend; otherwise, it gets directed to the C:\QDBorrow\QDPBData.txt file.

QuickDOC Program

QuickDOC provides the database function for raw data captured in *QDPortal*.

Latest QuickDOC Version is 2.0.2, and was posted on May 12, 2002; it implements the new *QDPortal* methods mentioned above (although most will also work in 2.0.1) and adds some further enhancements and fixes.

QuickDOC Installation. Installation Instructions are at:

   http://nnlm.gov/~quickdoc/InstallQD.html

QuickDOC Features Added in 2.0.2

1. A **Report of New Libraries Created** (C:\QDLoan\NewLibNt.txt) is made after a new Library record is created in an import from *QDPortal*. Can be

used as a reminder to edit and correct the automatically-created record while the Library information is fresh.

QDPortal will report all instances where a Library was created during the Import Session. This is to alert you to the creation and give you a chance to edit that Library immediately, to be sure that it reflects the Charge Profile, Groups affiliation, and other values that it should reflect.

Whenever a Library record is created, in either Receipts or Borrows, an entry is made in the **NewLibNt.txt** file (located in the C:\QDLoan folder of the machine running at the time) of the Library creation. When the import session is complete, if a new Library record has been created during that session, you'll see a Message Box with the following message:

> There were new Library records added during this session.
> A record of Libraries Added is kept in the File 'C:\QDLoan\NewLibNt.txt'.
> Delete that file manually when you're finished with it,
> Or it will grow larger with each Added Library.
> You can check it now or look at it later. Look at it Now?

If you click Yes, Notepad will open the file **C:\QDLoan\NewLibNt.txt** with the Libraries that have been added listed:

```
Thursday, May 02, 2002    Rpt of New Libraries Created in QDPortal Import
[Use this report to check/edit the New Lib Record]

Created new Library record for LIBID: MAUSJL in Lend Import.
Institution Name: Saints Memorial Medical Center (*5)
City, State, etc: Lowell, MA 01853
```

You can print a copy of this in Notepad, to use when editing the new Library records. Once you've printed the list, either delete the file C:\QDLoan\NewLibNt.txt or delete all its contents while in Notepad; otherwise any new Libraries will be added onto the end of this list and the file will continue to grow.

2. New **Loansome Doc Updates and Transfers** now properly enable the Import QDPortal Button, even if they are the only transactions for that session;

3. The field for **Loansome Doc Unique ID** now accepts up to 30 characters;

4. Completely revamped code where **Loansome Doc Patrons** are identified or created, including an Input Box for forcing the creation of Loansome Doc User Records in the common Lastname , Firstname format:

Loansome Doc Patrons are added in much the same way as regular Patrons. Since the Loansome Doc Patron comes in without a [Patron Number] in ALL cases, but will include a **Loansome Doc Patron UserID** field, we can use that field to look up the Patron by LDX UI in the same way we assign items to regular Patrons by using the Patron Number found in brackets at the end of the DOCLINE Patron name field.

In cases where that UserID isn't yet in the file, a new record will also be made. Since Loansome Doc Patrons can type in their names any way they please, we can't always be sure what the format may be, especially when the **LDX Patron isn't an actual person**.

Consider the case of the H.L. Snyder Memorial Research Foundation, located in Winfield, KS. When QuickDOC tries to parse out the name of this Loansome Doc Patron it's not going to do very well. Consequently, if it finds that it can't easily parse out a Loansome Doc Patron name, it will display an Input Box and leave the decision up to you:
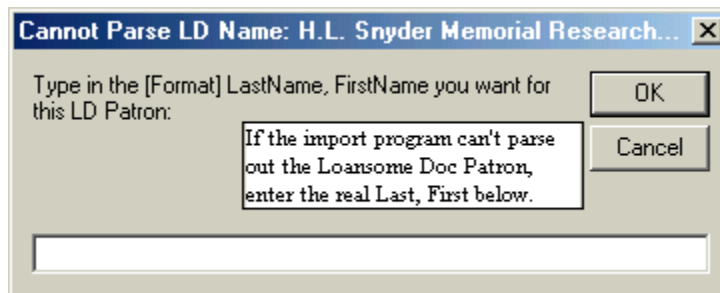
To achieve the best result in this kind of situation, first envision how you want the result to be displayed and sorted. In most reports and bills, the final format will be First Middle Last, Suffix (if any); sorting is always by Last Name. With that in mind, we want bills or reports to go to H.L Snyder Memorial Research Foundation, and we would prefer to have this "patron" sort under Snyder. To achieve that result enter:

> Snyder Memorial Research Foundation, H.L.

in the input box. QuickDOC will look for the comma and treat everything before it as the Last name. It will treat everything after the comma as a First Name. This should produce the desired result.

In cases where the desired result is something other than what QuickDOC gives you, just edit the field on the Patron Information Form, keeping in mind the formats for reports and bills, as well as sorting. Since any activity for this Loansome Doc patron in the future will be assigned to the patron record through the UserID match, it won't matter what the actual name field says, and your choice of Last Name, First Name will be used in all future activity.

5. Double-clicking on an Item in **Libraries List, Patrons List or Departments List** will now automatically bring up the full information form (same as clicking once on an entry and then clicking the Edit Library button in the old paradigm).

QuickDOC Program – Next Updates

The next update (the goal is July 1, 2002) will include the Local Billing function and related reports, etc.

1. **Patron and Dept Invoices (Itemized).** Information is currently being saved for both a Patron and a Dept charge for each Borrowed item, based on Local Charge Profiles stored with each Patron or Dept. Only at the time an Invoice is produced is either the Patron or Dept Charge value

assigned to the item, so that different charge-back values are permitted on an item, depending upon whether the Patron or Dept is invoiced. **In either Patron or Dept case, Invoices can be generated by Cost Center.**

2. **Patron and Dept Charges (Summary format).** Meant primarily to be sent to paying authorities (Dept or Grant) sorted by Cost Center, these can be used to generate interdepartmental transfers and payments, in both hardcopy & email formats. Will need to be somewhat configurable.

3. **Patron & Dept Reports.** Patron & Dept Mailing Labels, etc., (will add same for Libraries at the same time).

4. **Patron Notification.** Print or email notification of action on Borrows.

5. **More Built-in Reports**. Groups Reports, QuickReports for Libraries, etc.

After the Local Billing ...

After Local Billing, the next step will be to bring together the QDPortal & QuickDOC Programs into one entity (the goal for that is October 1, 2002), which will permit a number of new enhancements, for example.

1. **Direct Access to the QuickDOC.MDB Database while running QDPortal.** The current situation is the result of the need to get the basic data-saving device online in time for the July 17, 2000 introduction of new DOCLINE. It's always been viewed as a temporary situation. The temporary Save files will disappear and items saved on DOCLINE will go right to the database. On the input side, beyond just the separate Patrons List from which you can choose a Patron online, all the tables in the database will be available (e.g., you can do a quick search on a PubMed UI to see who might have provided it before; we can generate Patron emails while in DOCLINE, etc., etc.). This will make everything seem much more seamless than the current setup.

2. **ISO ILL Compatibility.** Once the two programs are working as one, the next step will be to intensify the effort to achieve compliance with the standards of the ISO ILL Protocol. This will be of use to libraries with a large number of OCLC transactions, but most DOCLINE Libraries will probably continue to use the current interface, with the occasional OCLC transaction passed through and tracked in QuickDOC under its DOCLINE Request Number. Sometime in early 2003 for this.

QuickDOC Invoices

BTW, I'm going to try catching up on the backoffice stuff, so be on the lookout for QD Invoices, etc. I haven't had much time to monitor payments for Annual Subscriptions, etc., including whether or not the one-time Upgrade Fee was paid in all cases for those who have upgraded from the old DOS QuickDOC to QDPortal and QD4Win; and whether new users have actually signed on, etc. Obviously, this isn't the best way to be in a position to pay my own bills, so I've got to get this part under control fairly soon. I'll be trying to get this under control over the next few months.

If you think you might not have paid the $125.00 Upgrade fee, or your subscription isn't up to date, there's an Order Form at the end of this document that you can use to remedy this.

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5/2002

QuickDOC For Windows [QD4Win]
ORDER FORM

QuickDOC For Windows [QD4Win] is priced at **US$299.95**
(DOS QD Subscribers (with up-to-date subscriptions) can upgrade for **US$125.00)**.

Additional QD4Win Items:

Annual Update Subscription (which you will need to renew once a year only; you'll get a notice when it's due) includes telephone and email help, access to the QuickDOC-L Listserv and Web Site, along with free downloaded upgrades to new versions posted during the year. [Since the first 3 months after initial purchase are free, the first "year" of the subscription actually runs for 15 months.]

Institution Name _____

Library Name _____

Address _____

City, State/Prov Zip _____

Contact Person _____ **Phone:** _____

Your Email Address: _____

Other Info.

NLM LIBID _____   **OCLC Code _____**   **Other Systems? _____**

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